APPENDIX E – AVID 6.0 Release Notes

AVID 6.0 Release Notes

Revised 6/1/18

Differences from AVID 5.5

There are two major updates in AVID 6.0 when compared to the functions in AVID 5.5. These are:

- 1) the inclusion of all Absentee document processing into the AVID processes; and
- 2) a new affidavit envelope review process.

This document specifies the processing differences that the borough staff should understand while processing transactions in AVID 6.0. There are also a change to voter search results specified in third section of these release notes.

1. New Absentee Document Support

In AVID 6.0, there must be an accompanying physical or virtual document for all changes to a voter's record. To meet this requirement, we have introduced several new queues to capture the documents for all absentee ballot requests. The queues are highlighted by the red rectangles in Figure 1.

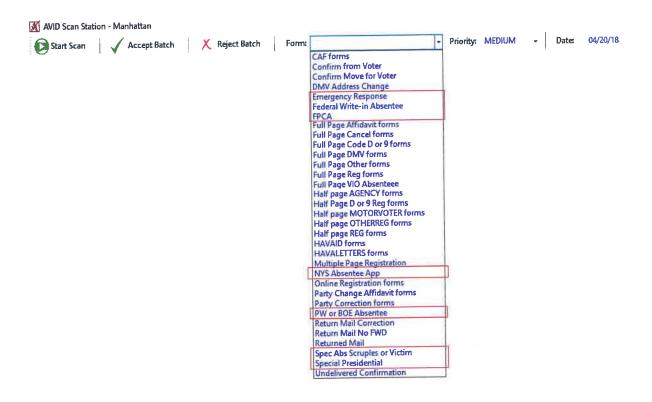
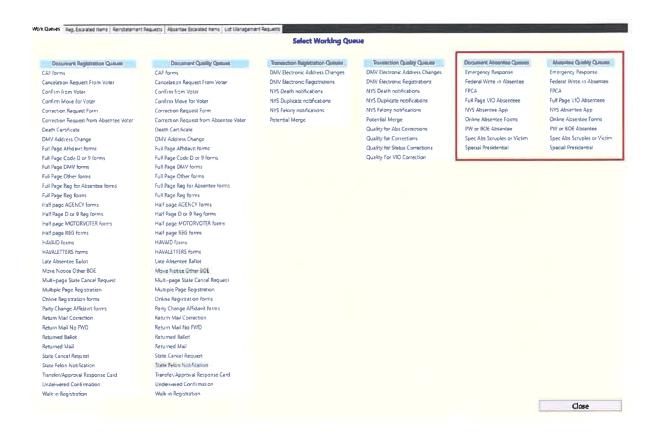


Figure 1 - New scan queues for Absentee

All AVID workflow stages provided to Registration processing (e.g. Initial Capture (REG), Bipartisan Review (Quality), Escalation, Suspense (Missing letter generation), and deletion) are also supported in the Absentee queues. To access the scanned absentee documents, the queue selector now has two absentee list groups on the right-hand side of the screen, see Figure 2.



After printing a letter from an AVID queue, the prompt show in figure 3 pertains to absentee queue processing only:

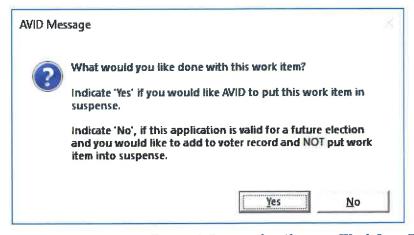


Figure 2-Prompt for Absentee Work Item Sent Letter

B) AVID 6.0 Affidavit Envelope Review Processing

Introduction

The following release notes cover the steps borough staff should take to make initial affidavit envelope validity determinations and voter updates based on information contained on affidavit envelopes using the AVID 6.0 system. The procedures contained within these notes represent a significant shift from the previous method for both affidavit accounting by ED and processing affidavit envelopes.

Overview of new process

The post-election sorting and batching of affidavits by ED/AD will remain the same as always. Likewise, borough staff should divide into bi-partisan affidavit review teams as always. With AVID 6.0, however, instead of entering initial counts into S-Elect, an email should be sent with initial counts to BOE executive management.

Staff will use the new affidavit subsystem in AVID 6.0 to review and record the disposition for each affidavit based on the information the voter has provided on the affidavit envelope. This review will be done by staff from opposing parties using a new bi-partisan team login feature of the AVID 6.0 system. The review will permit the team to indicate any changes needed to be made, such as a name change, party change, or address change. Importantly, there will no longer be the need for handwriting findings on the affidavit envelope. Instead, AVID 6.0 will print a label with all the relevant information that will be affixed to the affidavit envelope.

AVID 6.0 also provides a quality check of each affidavit envelope decision by a second bipartisan review team. This feature permits confirming or changing of decisions made by the initial review team. Behind the scenes, AVID is keeping S-Elect up to date with all decisions made or overridden, so that accurate counts can be reported.

Significantly, the new affidavit envelope disposition label printed from AVID 6.0 will contain a barcode identifying the decision identifier. This barcode is read by the scanner and the identifier is used in AVID Registration to direct the registration clerk based on the data collected in affidavit review. This direction (or hint as it is termed in AVID 6.0) can be a name change, party change, or address change.

As can be inferred from the new feature overview above, there are three main phases in AVID 6.0's affidavit process: Initial Affidavit Envelope Review, Quality Review for Affidavit Decisions, and Updating Voter Record from Affidavit Envelope. The procedures for processing each step follow.

Initial Affidavit Envelope Review Procedure

Step 1 – Define Initial Review Team to AVID.

a) Only bi-partisan teams can perform affidavit envelope reviews. To establish a bi-partisan team, a member of the opposing party from the one that is currently signed into AVID must also sign in. To do so, the user will select the Login Affidavit Partner option from the AVID File menu as shown by Figure 4.



Figure 3- Menu option for login of affidavit partner

a) AVID will then display an Affidavit Partner Login screen as shown in Figure 5. Note that there are two purposes for setting up a review team, Initial or Quality. To perform initial review, make sure the Initial Affidavit Review option is selected. Also, in the unusual case where there are two elections open for affidavit disposition entry, the election selection can be a drop-down list selection.



Figure 4- Affidavit Partner Login

a) The second user then enters their AVID login credentials. AVID makes sure that the two users are of opposing parties and that they are from the same borough. Note, to perform Quality Review, both users must have AVID Quality authority.

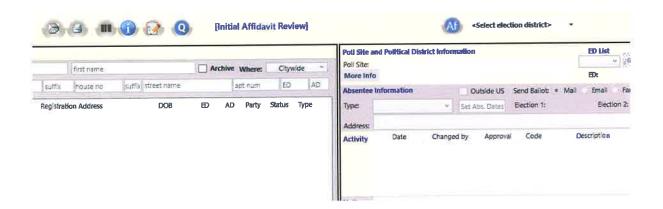


Figure 5- Initial Affidavit Review Start Screen

b) Upon successful login, AVID will display the Initial Affidavit Review start screen as shown in Figure 6. Note the selected queue should read "[Invalid Affidavit Review]" and you should also see the Af icon and a drop-down to select the election district to review.

Importantly, if you need to move to another queue such as Inquiry (Q), you can always go back to the affidavit review process by pushing the \mathbf{Af} icon.

Step 2 - Set ED/AD batch for review.

- a) You should have a batch of affidavits sorted by AD/ED before you. You will need to tell AVID which ED you are working. This can be done by directly entering the ED/AD as shown in Figure 6. Note anytime you want to directly navigate to an ED using the window in Figure 7, simply press the **Af** icon and the Set ED/AD for Affidavit Review window will display.
- b) Optionally, you may also set the working ED/AD for affidavit review by selecting from the drop-down to the right of the **Af** button as shown in Figure 8.

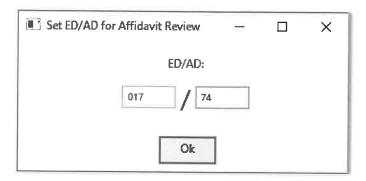


Figure 6- Window to Set ED/AD for Affidavit Review

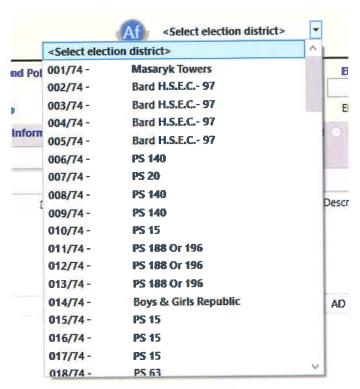


Figure 7- ED/AD drop-down list

Step 3 – Find voter in AVID.

a) You will use the standard AVID voter search to find the voter for the affidavit you are reviewing. After your search, even on a no match, you should see the *Record Review icon* as circled in Figure 9. If the voter is shown in the results, select the voter prior to recording the disposition review. You may select voters in the results to view and then select "No match" if none are the voter indicated in the affidavit.



Figure 8- Record Affidavit Disposition Icon shows after voter search.

Step 4 – Record Affidavit Disposition.

a) After finding the voter in step 3, you should push the *Record Review icon* (diskette image). AVID will look at all the data it has on file for the voter and decide what disposition should be indicated for this affidavit. AVID then displays the *Affidavit Envelope Review Window* as shown in Figure 10.

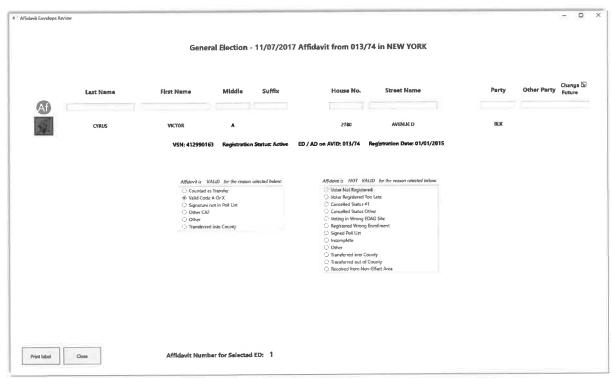


Figure 9- Affidavit Envelope Review Window

- a) Next you should verify the information and decision presented *in Affidavit Envelope Review Window* and make any needed changes. Using Figure 11 as a guide, you should verify the following:
 - a. As identified by the red circled 1 in Figure 11, make sure you are working the correct ED and election for the affidavit you have before you.
 - b. As identified by the red circled 3 in Figure 11, make sure the information presented is for the voter you have selected using the AVID Voter Search or the words **No Voter** are displayed if no match was found.
 - c. Make sure the Affidavit number has incremented to the next item in your id as identified by the red circled 6.
 - d. Next you will verify the that AVID decision is accurate or override it by selecting another option. Note in Figure 12, we have changed the AVID decision to Invalid by selected reason Incomplete. You will notice for the options of Other

- and **Incomplete** a text box is displayed for you to indicate the Other Reason or what is missing on the affidavit envelope.
- e. If no voter has been selected, ignore this step and step f. However, if you have selected a voter, compare the information on the affidavit envelope provided by the voter with the voter data presented in red circled 3 area in Figure 11. If you see any differences, type only those differences in the appropriate text box in the area identified by the red circled 2 in Figure 11.
- f. If you indicate a party change is needed, the default will be to make a future party change. However, if you see that it is the Board's error and the party should be different, uncheck the future party change check box to indicate to the registration clerk that a party change should be made.



Figure 10- Components of the Affidavit Review Window

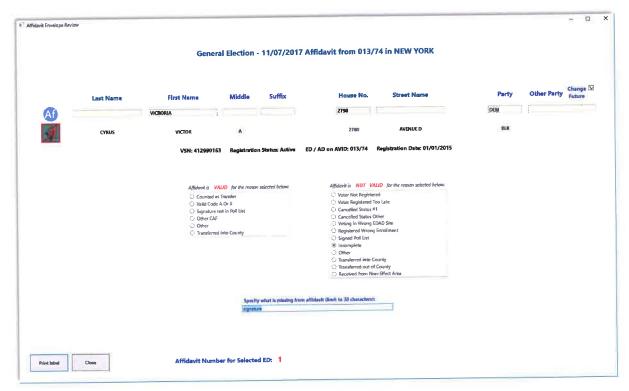


Figure 12 - Overriding AVID Decision

Step 5 – Print and Affix Label

- a) When both members of the affidavit review team are satisfied with the values made on the Affidavit Review Window, push the "Print Label" button from the area indicated by a circled red 5 in Figure 12.
- b) AVID will print a label like that shown in Figure 13. Note, the label shows the information that would have been handwritten before. Also, note that a barcode is printed to be used later to show any changes you have indicated to the registration clerk processing the affidavit envelope for voter updates.

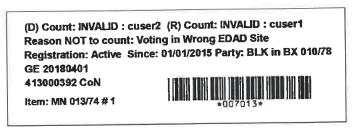


Figure 13- Affidavit Label with bar code.

Step 6 – Go to the next affidavit and repeat previous steps until all have been recorded.

Quality Review for Affidavit Decisions Procedure

Step 1 - Define Quality Review Team to AVID.

- a) To establish a bi-partisan affidavit Quality Review team, a member of the opposing party from the one that is currently signed into AVID with AVID Quality credentials must also sign in. To do so, the user will select the *Login Affidavit Partner* menu from the AVID *File* menu as previously shown in Figure 4.
- b) AVID will display the Affidavit Partner Login window as shown in Figure 14. Select the *Quality Review* radio button option and enter other team member credentials to establish the Quality Review Team.



Figure 14 - Affidavit Partner Login for Quality Review

Step 2 – Select working ED.

AVID will display the Quality Affidavit Review window. Note the queue selected should show [Quality Affidavit Review]. You should now use the same process as described in Step 2 of the *Initial Affidavit Envelope Review* procedure to select the ED of the affidavit envelope batch you wish to review. After selecting the ED, you should see the Quality Review Navigation Window as shown in Figure 15.



Figure 15 - Quality Review Navigation Window

Step 2 – Navigate through batch.

AVID has back and forward navigation controls to review the disposition provided in the Initial Affidavit Review for each envelope in the ED batch. You should visit each disposition made and verify it. If you need to go directly to an affidavit within a batch, you can click on the label between the back and forward icons (e.g. 1 of 2 in Figure 15) and a text box and Go button will be displayed as in Figure 16. Simply, enter the affidavit number of the ED batch and push the Go button to go directly to that affidavit review item.



Figure 16 - Navigate directly to an Affidavit Review item.

Step 3 – Override any initial decision.

As a Quality Review team, you can override the decision based on your Voter Search or by comparing the voter automatically brought in context by AVID, the affidavit envelope itself, and the decision previously recorded.

- a) If you think the wrong voter has been associated with the affidavit, select the voter you wish to associate with the affidavit decision after Voter Search.
- b) Whether you have changed the voter or not, you can change the affidavit review and corresponding label by clicking on the disposition displayed in the navigation bar (e.g. Cancelled Status Other in Figure 16).
- c) The affidavit review window (see Figure 12) will display in just the same way that it does for initial affidavit review. You should follow then follow Steps 4 and 5 form the initial affidavit review procedure.
- d) AVID will automatically decrement and increment the counters sent to S-Elect for affidavit reasons by ED.

Note, by not overriding the decision, you have consented to the original decision made in the Initial Affidavit Review Process.

Updating Voter Record from Affidavit Envelope Procedure

Step 1 – Scan affidavit envelopes

Make sure that your scanner has a straight path for scanning by opening the back side of the scanner. Scan the affidavit envelopes after selecting "Full Page Affidavit forms" for the form type as shown in Figure 17.

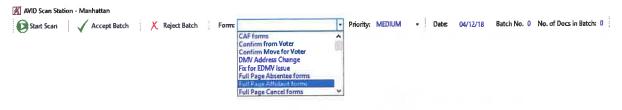


Figure 17 - Scan Affidavit Envelopes

Step 2 – Process in Registration

a) Select the Full Page Affidavit forms from the Document Registration Queue as shown in Figure 18.

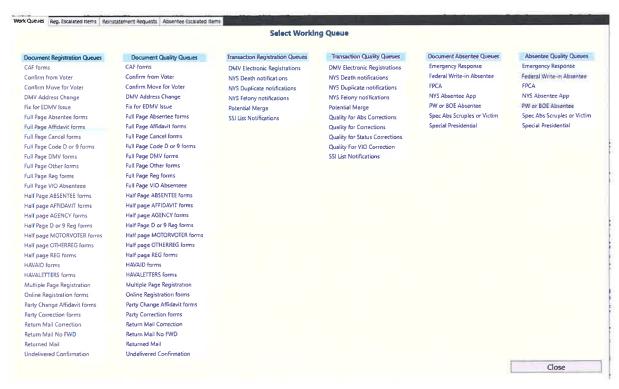


Figure 18 - Full Page Affidavit Selection

a) The AVID scanning process reads the barcode printed on the label affixed to the affidavit. This ensures that all affidavits are processed prior to the request for printing of valid of invalid affidavit letters. If for some reason the scanner is not able to read a barcode, a window to capture the ID will automatically be displayed (see Figure 19). You will need to enter the number printed under the barcode and press Ok.

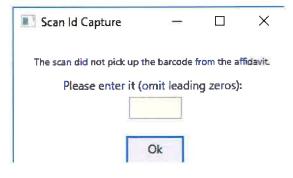


Figure 19 - Barcode number entry

Step 3 – Optionally process hint

a) If there were changes needed changes based on the Affidavit review process, the registration clerk will see a hint icon (yellow light bulb) display in the AVID toolbar as shown in Figure 20.



Figure 20 - Hint Icon

a) When the registration clerk pushes the Hint Icon, the Work Item Hints window shown in Figure 21 is displayed. The user can take any or all actions suggested by selecting or deselecting the checkboxes and pushing the Make Changes Icon. By default, all items are selected.

Work Item Hints	-		×
Source: Affidavit Review From: cuser1-cuser2			
Description			
After affidavit research, the affidavit was determined to be VALID. the reason for Code A or X.	this was:	Valid	
The following action(s) are recommended:			
✓ Change first name to JILL			^
Change house number to 42			
Change street name to BROADWAY			
Change party to DEM			
Make Changes Cancel			V

Figure 21 - Work Item Hints Window

- a) For valid affidavits, processing in Registration and Quality should proceed like previous versions of AVID. Invalids should only be sent a letter if missing information. AVID invalid affidavit letters will be printed centrally at the end of the affidavit process.
- b) When the Registration or Quality clerk believes the wrong voter has been linked to the affidavit, they can escalate the work item with reason *Further Affidavit Review*. A

Quality Review team can than revisit the affidavit, delete the work item, reprint a new label, affix to affidavit, rescan and process through AVID.

Monitoring the Affidavit Progress in AVID

As depicted in Figure 22, AVID offers four new reports to help monitor the progress of the affidavit review process. A user with management authority can generate these reports from the **AVID Reports Selector** launched from the **Reports** item in the **Management** menu.

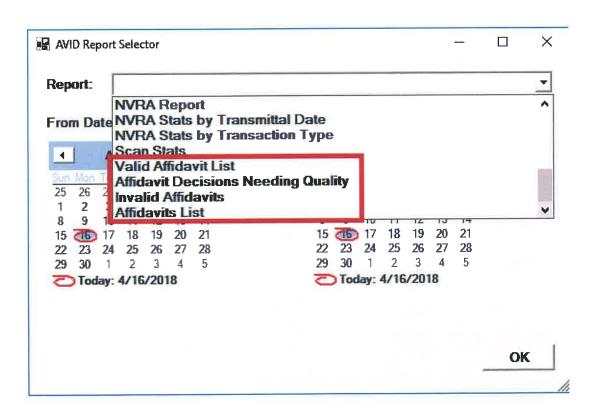


Figure 22 - New Reports for Affidavit Review Monitoring

Prior to scanning affidavit envelopes and processing these documents to voters in AVID, it is important to make sure that all affidavit decisions have gone through quality review. To help make sure this is the case, AVID offers a report identifying any affidavit envelopes that have had initial review but not gone through Quality Review. This report is depicted in Figure 23.

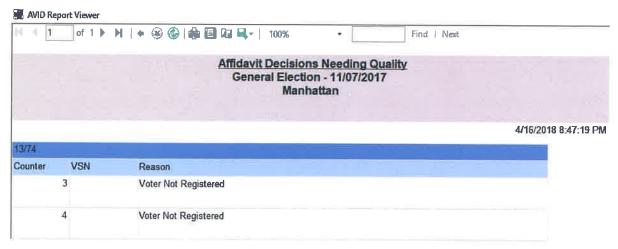


Figure 23 - Affidavit Decisions Needing Quality

The remaining reports shown in Figures 24-26, show each affidavit decision by Affidavit counter within ED/AD for the selected borough and election.

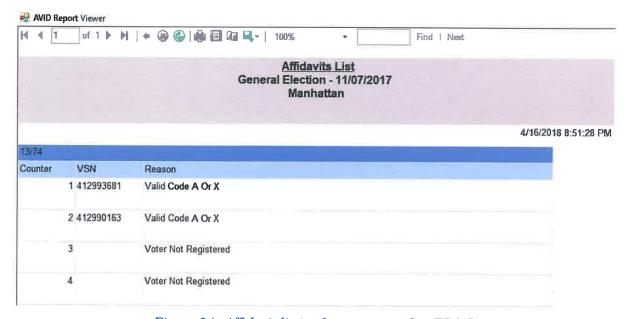


Figure 24- Affidavit listing by counter within ED/AD



Figure 25 - Invalid Affidavit listing by counter within ED/AD

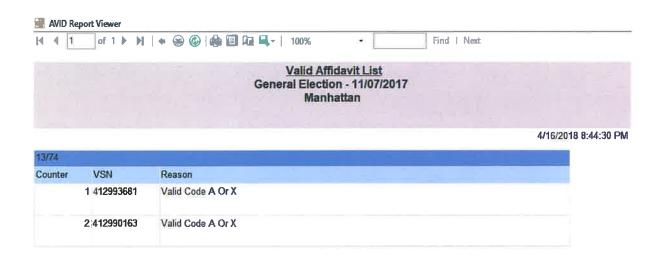


Figure 26 - Valid Affidavit listing by counter within ED/AD

C) Voter search results in AVID 6.0

It is important to make sure a duplicate record that might be cancelled is not selected for processing when an active record also exists. To help prevent this from happening, AVID now turns the background to red for any voter in a voter search that is in a cancelled status as shown in Figure 26.

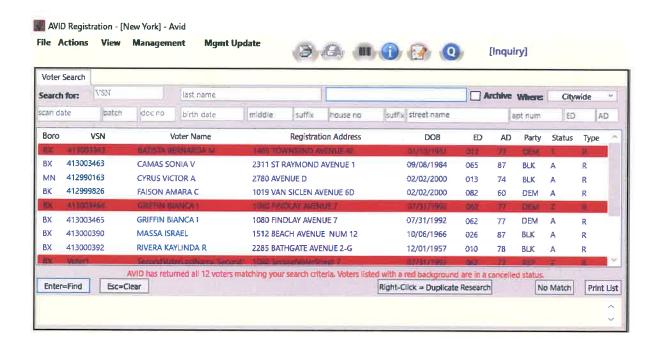


Figure 26 - Voter Search with cancelled voters shown in red.